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ABSTRACT

College and university expenditures for scholarships and fellowships between 1983 and 1984 are reported based on findings of the Financial Statistics of Institutions of Higher Education survey, which is part of the Higher Education General Information Survey (HEGIS) data collections. Colleges increased by 13.4% their scholarship and fellowship expenditures from fiscal years 1983 to 1984. Private colleges accounted for nearly half of all expenditures even though they have only about 25% of total full-time equivalent (FTE) enrollments. Four-year and above institutions accounted for 84% of total scholarship and fellowship expenditures in both fiscal years. Pell Grant expenditures reported by colleges increased 14.2%, while other scholarships and fellowships increased 12.9%. Information is included on restricted and unrestricted expenditures. Restricted expenditures come from an entitlement program (e.g., Pell Grants) and must be spent on scholarships and fellowships. Unrestricted scholarship and fellowship expenditures are funds over which colleges have discretionary control. Data are provided by state on the amount of scholarship and fellowship expenditures broken down by level and control of institution. (SW)

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Historical report

OERI

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November 1986

Scholarship and Fellowship Expenditures

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Institutions of higher education reported that their expenditures for scholarships and fellowships increased 13.4 percent between fiscal years 1983 and 1984. These expenditures grew even though full-time equivalent (FTE) student enrollment increased less than 1 percent. Thus, the average award per FTE student increased about 12 percent, from $526 to $591. These FTE expenditures for public and private institutions were $400 and $1,167 respectively.

These are some of the findings of the survey, "Financial Statistics of Institutions of Higher Education," which was distributed to approximately 3,330 institutions as part of the 18th and 19th annual Higher Education General Information Survey (HEGIS) data collections. The HEGIS 18 and 19 finance surveys were the first to include institutional expenditures for Pell grants as scholarships and fellowships, therefore expenditures reported here will be higher than those reported in earlier HEGIS surveys.

Results of the analysis are summarized below. Additional information by State is presented in tables 1 and 2.

Control of Institution (public and private)

From FY 1983 to FY 1984, public institutions' scholarship and fellowship expenditures grew from $2.4 billion to about $2.8 billion, a 12.6 percent increase. Private institutions' scholarship and fellowship expenditures rose from $2.3 billion to about $2.7 billion, a 14.3 percent increase. Private institutions accounted for nearly half of all expenditures even though they have only about 25 percent of total FTE enrollments.

Level of Institution (4-year and above, and 2-year)

The rates of growth in scholarship and fellowship expenditures for 4-year and above, and 2-year institutions were nearly equal during 1983 and 1984; 4-year institutions

Scholarship and fellowship expenditures of institutions of higher education: 50 States and D.C., Fiscal years 1983 and 1984*

(Amount in millions)

	FY 1983 amount	FY 1984 amount	Percent change
Total scholarship and fellowship expenditures	$4,779	$5,421	13.4
Control of institution:			
Public	2,446	2,755	12.6
Private	2,333	2,666	14.3
Level of institution:			
Four-year and above	4,011	4,561	13.7
Two-year	768	861	12.1
Type of expenditure:			
Restricted	3,300	3,683	11.6
Unrestricted	1,479	1,738	17.5
Type of award:			
Pell Grants	1,856	2,120	14.2
Other aids	2,923	3,300	12.9

*Due to rounding, detail may not add to totals.

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increased 13.7 percent, and 2-year institutions increased 12.1 percent. Four-year and above institutions accounted for 84 percent of total expenditures in both fiscal years.

Type of Expenditure (restricted and unrestricted)

Scholarship and fellowship expenditures are divided into two categories. Restricted expenditures represent those funds expended as a result of an entitlement program (e.g. Pell Grants) and the monies must be spent on scholarships and fellowships. Students are not required to perform any work or service for the aid or grant. Unrestricted scholarship and fellowship expenditures are funds over which institutions have discretionary control.

Restricted scholarship and fellowship expenditures increased from $3.3 billion to nearly $3.7 billion, an increase of 11.6 percent over FY 1983. Unrestricted scholarship and fellowship expenditures increased from about $1.5 billion to $1.7 billion, a 17.5 percent increase from FY 1983 to FY 1984.

Type of Award (Pell Grants and other scholarships and fellowships)

Pell Grant expenditures reported by institutions of higher education increased 14.2 percent, from nearly $1.9 billion to $2.1 billion between fiscal years 1983 and 1984. "Other scholarships and fellowships" increased 12.9 percent, to $3.3 billion during the same time period.

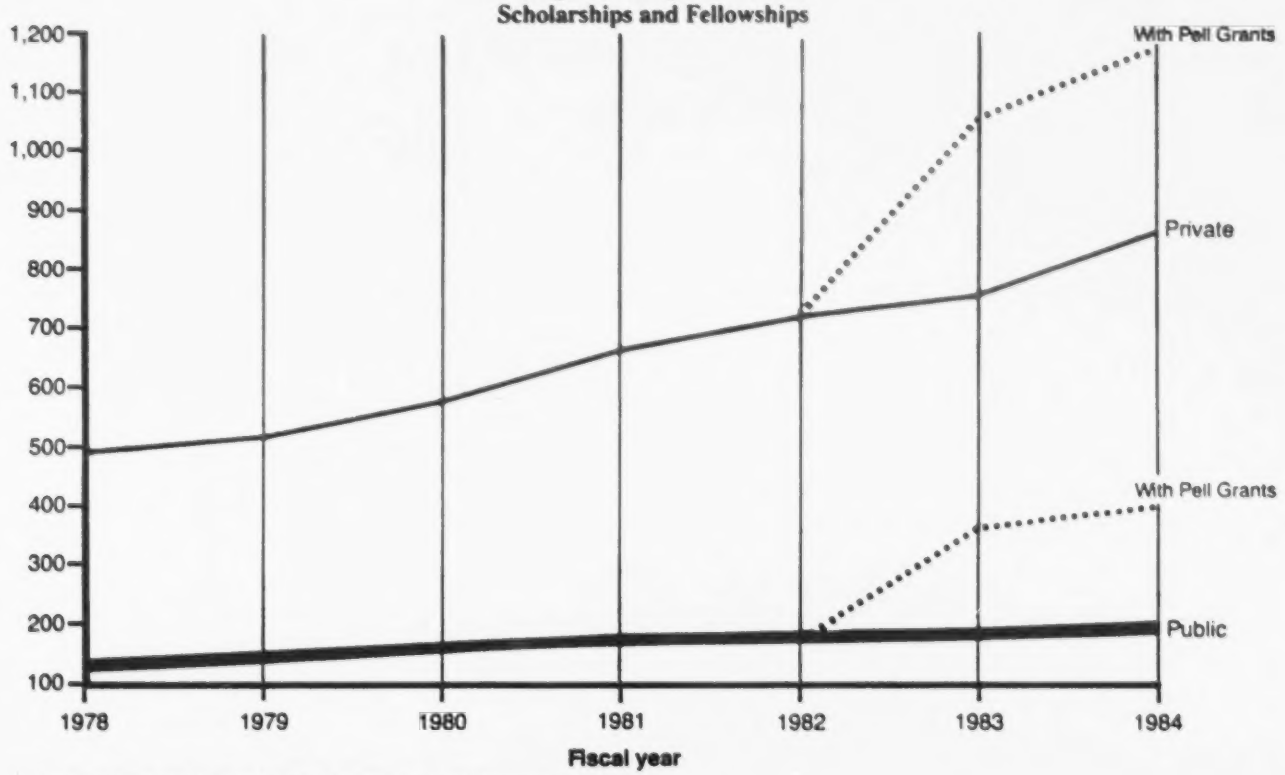
The Pell Grant expenditures reported here are less than other published numbers for several reasons. The most important is that the HEGIS surveys do not include the entire postsecondary universe of institutions that disburse Pell Grants. For example, less-than-2-year institutions and unaccredited schools are not included in the survey. Another reason for the discrepancy is that only that portion of the Pell Grant that is spent is reported; Pell Grant Disbursing Office figures include total amounts that are disbursed or allocated. Also, some differences are attributable to variations in accounting periods. Regardless of the specific reason, the figures in this bulletin understate actual Pell Grant expenditures.

Trend Data Show Increase in Private FTE Awards

Since Pell Grant expenditures were first included as scholarships and fellowships in the HEGIS 18 finance (FY 1983) survey, the graph below was developed to provide historical continuity and measure the impact of including the grants. For example, the average FY 84 FTE expenditure in public institutions ($400) included $215 in Pell Grants and $185 in other forms of aid. In private institutions, the $1,167 average FTE expenditure included $312 in Pell Grants. While the average FTE Pell Grant in private institutions was higher than in the public institutions ($312 versus $215) the grants were a much smaller proportion of the overall average FTE expenditures ($1,167).

When Pell Grants are excluded from the scholarships and fellowships FTE expenditure calculations, the rate of change for private schools is greater than that for public institutions. For example, private institutional expenditures per FTE grew from $495 in FY 78 to $855 in FY 84, an overall increase of 73 percent. In public institutions, the comparable figures were $131 and $185, a 41 percent increase, respectively.

Average FTE Expenditures for Scholarships and Fellowships



Source: HEGIS XIII-XIX Fall Enrollment and Finance Surveys

Further Information

The financial statistics survey form was mailed to approximately 3,300 and 3,330 colleges and universities in fiscal years 1983 and 1984, as part of the 18th and 19th annual Higher Education General Information Survey (HEGIS), respectively. Data were imputed for most of those institutions that did not respond to the survey. The 28 new institutions that did not respond to the HEGIS finance survey were not imputed. Their estimated expenditures were less than one percent of those for all institutions of higher education.

Data in this bulletin and other survey data can be obtained on a computer tape. The tape includes institutional-level statistics on current funds revenues and expenditures, physical plant assets, indebtedness on physical plant assets, market and book values of endowment assets, and statements of changes in fund balances. Special tabulations can also be ordered. For costs and further information please contact the Public Information Office, Information Services, 555 New Jersey Avenue NW., Washington, D.C. 20208, telephone number (800) 424-1616 or 626-9854.

For information on this bulletin, contact Arlie B. Gordon, Postsecondary Education Statistics Division, Center for Statistics, 555 New Jersey Avenue, NW., Washington, D.C. 20208, telephone (202) 357-6363.

Table 1.—Scholarship and fellowship expenditures in higher education by type and by State: Fiscal years 1983 and 1984

States & D.C.	Fiscal year 1983			Fiscal year 1984			Percent change over '83	
	Total	4-year	2-year	Total	4-year	2-year	4-year	2-year
	(In thousands)							
Totals	$4,778,776	$4,010,797	$767,980	$5,421,389	$4,560,636	$860,753	13.7	12.1
Alabama	65,746	51,169	14,577	74,119	58,997	15,121	15.3	3.7
Alaska	2,629	1,618	1,011	2,857	1,792	1,066	10.8	5.4
Arizona	53,304	36,549	16,755	57,109	41,299	15,809	13.0	−5.6
Arkansas	36,833	30,769	6,065	41,580	34,286	7,294	11.4	20.3
California	370,504	303,271	67,233	429,534	364,401	65,132	20.2	−3.1
Colorado	88,621	79,376	9,245	105,015	92,889	12,126	17.0	31.2
Connecticut	86,674	82,194	4,480	97,741	92,034	5,706	12.0	27.4
Delaware	11,423	10,025	1,398	12,146	10,774	1,372	7.5	−1.9
Dist. of Col.	46,227	46,227	---	53,284	53,284	---	15.3	---
Florida	120,364	83,057	37,307	136,891	97,230	39,660	17.1	6.3
Georgia	73,035	60,663	12,371	78,248	65,754	12,494	8.4	1.0
Hawaii	7,117	6,137	980	8,607	7,532	1,075	22.7	9.7
Iowa	81,369	69,290	12,079	95,002	80,438	14,564	16.1	20.6
Idaho	13,492	10,879	2,613	15,514	12,527	2,987	15.1	14.3
Illinois	215,645	182,095	33,549	252,249	208,886	43,362	14.7	29.2
Indiana	131,518	112,154	19,364	151,849	127,994	23,854	14.1	23.2
Kansas	43,420	36,192	7,227	52,824	44,991	7,832	24.3	8.4
Kentucky	56,393	47,342	9,051	68,501	53,845	14,656	13.7	61.9
Louisiana	65,970	63,219	2,750	76,948	73,798	3,149	16.7	14.5
Massachusetts	279,387	254,943	24,444	316,861	294,183	22,678	15.4	−7.2
Maryland	79,514	67,161	12,354	93,605	77,013	16,593	14.7	34.3
Maine	32,253	30,514	1,739	35,713	33,889	1,824	11.1	4.9
Michigan	203,973	159,034	44,939	226,911	174,868	52,042	10.0	15.8
Minnesota	106,261	95,071	11,190	119,213	104,576	14,636	10.0	30.8
Missouri	84,479	78,128	9,351	107,280	95,919	11,361	22.8	21.5
Mississippi	63,226	44,607	18,619	69,822	49,876	19,946	11.8	7.1
Montana	13,471	12,399	1,072	16,085	14,578	1,508	17.6	40.7
North Carolina	133,348	112,105	21,243	146,160	124,026	22,133	10.6	4.2
North Dakota	19,572	16,610	2,962	24,653	21,032	3,622	26.6	22.3
Nebraska	40,159	36,056	4,103	45,402	40,549	4,853	12.5	16.3
New Hampshire	27,104	25,611	1,493	29,976	28,598	1,378	11.7	−7.7
New Jersey	120,190	95,313	24,876	131,823	106,072	25,752	11.3	3.5
New Mexico	24,350	22,677	1,672	23,805	21,968	1,837	−3.1	9.9
Nevada	5,235	4,518	717	4,662	4,041	621	−10.6	−13.4
New York	636,526	514,059	122,467	703,603	576,467	127,135	12.1	3.8
Ohio	197,242	167,826	29,416	232,376	195,095	37,281	16.2	26.7
Oklahoma	45,009	35,605	9,404	51,162	41,556	9,606	16.7	2.1
Oregon	59,328	44,195	15,132	66,417	48,759	17,659	10.3	16.7
Pennsylvania	271,384	235,097	36,287	306,119	263,877	42,242	12.2	16.4
Rhode Island	37,843	35,077	2,766	40,806	37,233	3,573	6.1	29.2
South Carolina	51,201	39,747	11,455	60,361	47,616	12,745	19.8	11.3
South Dakota	17,947	17,352	595	21,891	21,407	484	23.4	−18.7
Tennessee	89,257	76,885	12,372	100,047	84,897	15,151	10.4	22.5
Texas	195,522	160,441	35,081	213,768	171,735	42,033	7.0	19.8
Utah	31,141	26,682	4,459	35,155	29,469	5,685	10.4	27.5
Vermont	22,279	20,897	1,382	26,053	24,170	1,883	15.7	36.3
Virginia	89,423	75,669	13,754	94,369	80,272	14,097	6.1	2.5
Washington	83,603	68,213	15,390	97,083	76,502	20,581	12.2	33.7
West Virginia	26,093	24,013	2,080	32,876	30,455	2,421	26.8	16.4
Wisconsin	112,125	97,113	15,011	125,058	107,572	17,486	10.8	16.5
Wyoming*	7,047	4,949	2,098	12,254	9,609	2,646	94.16	---

---Indicates data not available.

*Wyoming increases are due to State sources for fiscal year 1984.

Table 2.—Scholarship and fellowship expenditures in higher education by control and by State: Fiscal years 1983 and 1984

States & D.C.	Fiscal year 1983			Fiscal year 1984			Percent change over '83		
	Total	Public	Private	Total	Public	Private	Total	Public	Private
	(In-thousands)								
Totals	4,778,776	2,445,653	2,333,123	5,421,389	2,755,006	2,666,383	13.4	12.6	14.3
Alabama	65,746	40,994	24,752	74,119	48,153	25,966	12.7	17.5	4.9
Alaska	2,629	2,332	296	2,857	2,458	399	8.7	5.4	34.8
Arizona	53,304	48,693	48,611	57,109	51,178	5,931	7.1	5.1	28.6
Arkansas	36,833	25,910	10,923	41,580	30,328	11,252	12.9	17.1	3.0
California	370,504	201,309	169,195	429,534	235,557	193,977	15.9	17.0	14.6
Colorado	88,621	72,497	16,124	105,015	86,840	18,175	18.5	19.8	12.7
Connecticut	86,674	19,804	66,870	97,742	20,077	77,665	12.8	1.4	16.1
Delaware	11,423	9,593	1,831	12,146	10,116	20,030	6.3	5.5	10.9
Dist. of Col.	46,227	2,414	43,813	53,284	3,226	50,058	15.3	33.6	14.3
Florida	120,364	67,674	52,690	136,891	73,555	63,336	13.7	8.7	20.2
Georgia	73,035	31,201	41,833	78,248	31,833	46,415	7.1	2.0	11.0
Hawaii	7,117	4,885	2,231	8,607	5,355	3,252	20.9	9.6	45.8
Iowa	81,369	38,690	42,679	95,002	43,205	51,797	16.8	11.7	21.4
Idaho	13,492	10,800	2,691	15,514	12,603	2,911	15.0	16.7	8.2
Illinois	215,645	89,326	126,319	252,249	100,626	151,623	17.0	12.7	20.0
Indiana	131,518	69,399	62,120	151,849	78,979	72,870	15.5	13.8	17.3
Kansas	43,420	28,167	15,253	52,824	35,659	17,164	21.7	26.6	12.5
Kentucky	56,393	30,237	26,156	68,501	40,646	27,855	21.5	34.4	6.5
Louisiana	65,970	42,914	23,056	76,948	50,329	26,619	16.6	17.3	15.5
Massachusetts	279,387	48,197	231,191	316,861	53,538	263,323	13.4	11.1	13.9
Maryland	79,514	44,365	35,149	93,605	53,330	40,275	17.7	20.2	14.6
Maine	32,253	19,209	13,044	35,713	21,901	13,811	10.7	14.0	5.9
Michigan	203,973	152,056	51,917	226,911	168,099	58,812	11.2	10.6	13.3
Minnesota	106,261	48,340	57,922	119,213	54,733	64,480	12.2	13.2	11.3
Missouri	87,479	39,047	48,432	107,280	48,499	58,782	22.6	24.2	21.4
Mississippi	63,226	51,436	11,790	69,822	56,899	12,923	10.4	10.6	9.6
Montana	13,471	11,043	2,439	16,085	13,367	2,718	19.4	21.0	11.9
North Carolina	133,348	63,130	70,218	146,160	70,467	75,692	9.6	11.6	7.8
North Dakota	19,572	16,684	2,888	24,653	21,141	3,513	26.0	26.7	21.6
Nebraska	40,159	24,002	16,157	45,402	27,326	18,077	13.1	13.8	11.9
New Hampshire	27,104	9,993	17,111	29,976	10,271	19,705	10.6	2.8	15.2
New Jersey	120,190	63,438	56,752	131,823	64,575	67,248	9.7	1.8	18.5
New Mexico	24,350	20,764	3,585	23,805	20,144	3,661	−2.2	−3.0	2.1
Nevada	5,235	5,160	75	4,662	4,571	91	−10.9	−11.4	21.3
New York	636,526	255,879	380,647	703,603	277,570	426,033	10.5	8.5	11.9
Ohio	197,242	96,752	100,491	232,376	114,711	117,665	17.8	18.6	17.1
Oklahoma	45,009	27,619	17,390	51,162	31,469	19,693	13.7	13.9	13.2
Oregon	59,328	42,672	16,655	66,417	47,250	19,168	11.9	10.7	15.1
Pennsylvania	271,384	99,487	171,897	306,119	110,498	195,621	12.8	11.1	13.8
Rhode Island	37,843	13,601	24,242	40,806	13,339	27,467	7.8	−1.9	13.3
South Carolina	51,201	25,757	25,444	60,361	31,813	28,547	17.9	23.5	12.2
South Dakota	17,947	11,163	6,784	21,891	13,052	8,839	22.0	16.9	30.3
Tennessee	89,257	40,761	48,496	100,047	44,977	55,071	12.1	10.3	13.6
Texas	195,522	121,052	74,470	213,768	129,989	83,779	9.3	7.4	12.5
Utah	31,141	21,122	10,019	35,155	24,336	10,818	12.9	15.2	8.0
Vermont	22,279	9,845	12,434	26,053	10,974	15,079	16.9	11.5	21.3
Virginia	89,423	57,462	31,961	94,369	58,778	35,591	5.5	2.3	11.4
Washington	83,603	61,120	22,483	97,083	70,912	26,171	16.1	16.0	16.4
West Virginia	26,093	16,681	9,411	32,876	21,287	11,589	26.0	27.6	23.1
Wisconsin	112,125	83,930	28,195	125,058	92,213	32,845	11.5	9.9	16.5
Wyoming*	7,047	7,047	---	12,254	12,254	---	73.9	73.9	---

---Indicates data not available.

*Increases in Wyoming totals are due to State sources in fiscal year 1984.